



Pro Bono OR - Guidance for volunteers

Thank you for agreeing to become a volunteer for Pro Bono OR.

Although a pro bono project for a third sector organisation is a voluntary activity, it is still an OR project and should be treated with all the commitment, rigour and professionalism that such a project requires. These guidelines have been produced to help ensure the project goes as smoothly as possible.

You may be the first OR person that the organisation has ever worked with, so as well as – we hope – deriving satisfaction from your role, you are an ambassador for the whole profession. So do get in touch if you have any doubts, problems, or successes you want to share. In any case, we hope you enjoy the experience, and look forward to receiving your feedback.

Our Aims We are here to:

- help third sector organisations build their impact and achieve their desired outcomes.
- promote awareness and understanding of the benefits of OR across the third sector and to wider audiences.
- give OR professionals an opportunity to practise in a wider arena and to develop their experience.

Our Values We aim to be:

- open and welcoming:
 - working inclusively
 - building relationships, treating people with respect
 - embracing diversity
 - sharing knowledge
 - being transparent in our dealings
- helpful, serving customers without seeking personal gain
- trustworthy
- rooted in evidence and rational analysis:
 - rigorous
 - objective
 - learning

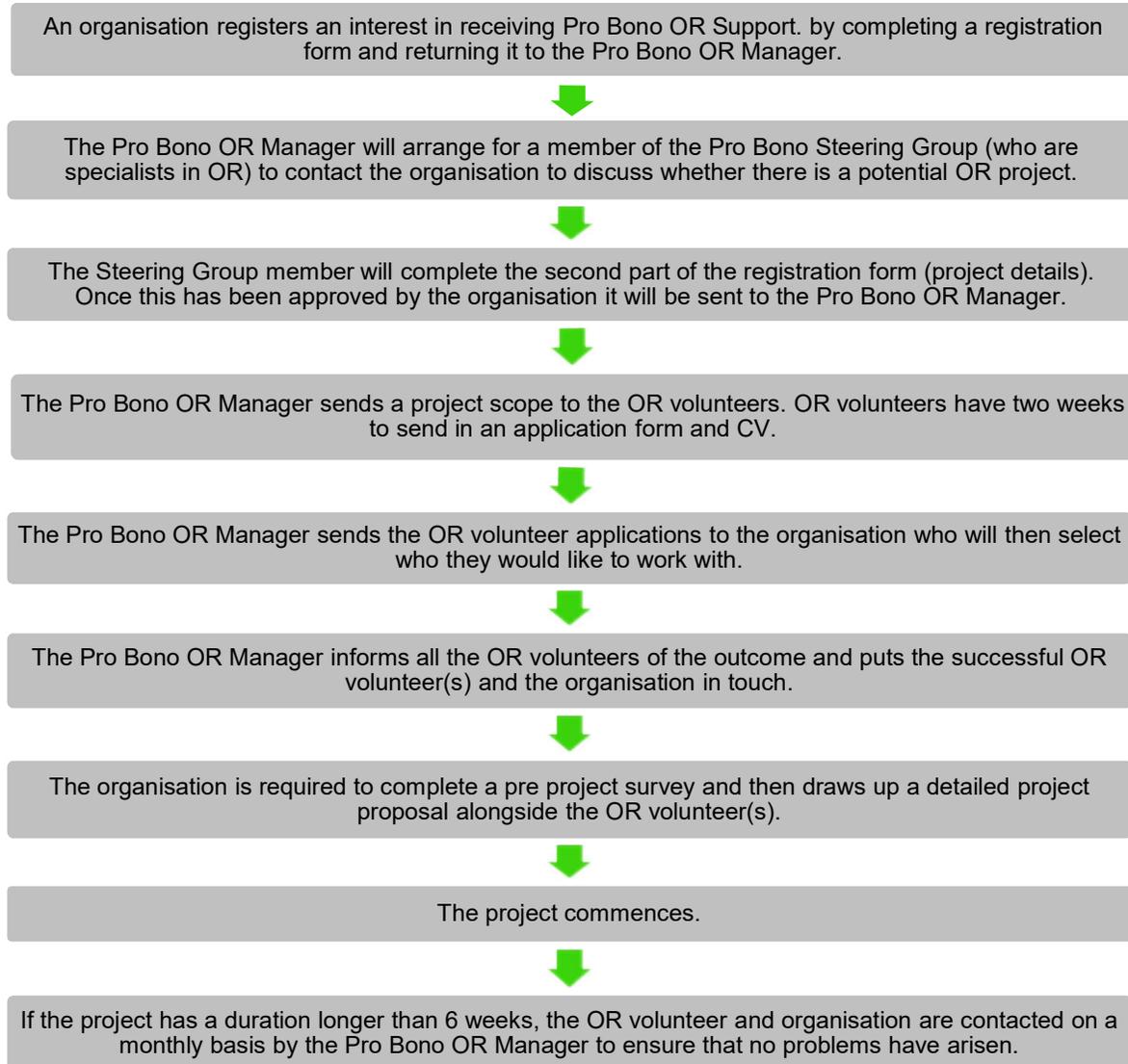
Our Service We will:

- advertise potential projects to all who have expressed an interest in volunteering, and share qualifying responses with
- oversee the project with a light touch: checking that it has an agreed scope and deliverables, that it is progressing as planned and being on hand to help with problems
- support the ending of the project and request feedback to evaluate our service
- publicise the project if suitable, and by agreement
- follow our Pro Bono Process and adhere to The OR Society's Statement of Ethical Principles.

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The Process



Upon completion of the project

At the end of the project, both the OR volunteer(s) and the organisation are required to provide feedback to The OR Society. The organisation is required to complete post-project surveys immediately afterwards, 6 months and 12 months after completion of the project to assess the benefits achieved. The OR volunteer(s) will produce a case study slide which will be published across the OR Society's media platforms

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Project management

The project description in the notice from Pro Bono OR is not intended to be definitive. We expect the volunteer on the ground – you! – to agree full details with the organisation. You should

- meet the client to agree with them what the project should cover. This will take into account the more detailed information you will be able to get, as the volunteer on the ground, compared with the ‘project scoper’; and relate to your own understanding and expertise, your own time available, and the latest thinking of the client (which may have developed since the first scoping)
- draw up a project proposal, using the specimen [project proposal form](#), adapted as necessary; and agree this with the client. The clearer and more explicit the obligations of everyone involved are the better. So try to make sure that the agreement covers the essentials. Whilst some of this may have already been covered on the registration form, you will be providing an updated version which both you and the client can commit to. It should include:
 - *what the organisation is expected to do and what the volunteer and any other parties are expected to do*
 - *within what time periods*
 - *a description of the problem and the boundaries or limits of the volunteer’s involvement*
 - *the goals or aims of the intervention*
 - *how the problem will be tackled, the kind of data that will be needed, the data collection methods that will be used*
 - *how progress will be reviewed and how the intervention can be evaluated*
 - *how the project will be quality assured (for projects where any analysis/report/recommendations are made).*
 - *the nature of the final report or other outcome*
 - *follow-up activities that may be required*
 - *how and when feedback will be given to the volunteer after the intervention*

You must return the project proposal form to the Pro Bono OR manager within **one month** of the project starting.

The Pro Bono OR manager will check in with you and the charity once a month to ensure the project is still on track. You may of course change the project details as the project proceeds, but we ask you to keep the project proposal updated, and to let the Pro Bono manager know if the timescale or deliverables change significantly.

Help from the Pro Bono team

The Pro Bono service is always ready to help if you encounter any problems. For example:

- we can find additional analysts if you need more time, more expertise or some mentoring support
- If the charity is not responding to you, the Pro Bono manager will be able to step in

So please, if anything is going wrong with your project or charity relationship, contact the Pro Bono manager who will be very willing to help.

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Quality assurance

Pro Bono OR recommends using the [Quality Assurance tools and guidance](#) provided on GOV.UK when quality assessing any work.

Conflict of interest

A conflict of interest arises where your commitments as a volunteer, are likely to be compromised, or may appear to be compromised, by your personal gain, or gain to immediate family (or a person with whom you have a close personal relationship) whether financial or otherwise.

If you think you may have a conflict of interest please speak to the Pro Bono OR Manager immediately.

You must not take on a project with the intention of trying to gain paid work. Pro Bono OR is free support arranged on behalf of The OR Society and must not result in any financial gain to the volunteer. That said, there is no bar on you subsequently undertaking paid work for the organisation if this is agreed to be suitable to all concerned. **If the organisation proposes this within 12 months of the completion of your Pro Bono engagement, you must declare it to the Pro Bono OR Manager.**

Post-project feedback and publicity

In order to evaluate the work carried out on behalf of The OR Society and help to fulfil The OR Society's charitable aims, both the organisation and you should complete feedback forms at the end of the project and return these to the Pro Bono OR Manager at The OR Society.

In order to help publicise the work, we ask you to complete a case study summary using [this template](#), in consultation with your client. We also encourage you to consider writing up your experience for *Inside OR*, proposing your project as an *Impact* article if it has led to implementation and change at the organisation, and presenting at conferences, to your local Regional Group or at a Third Sector Special Interest Group meeting. All of this will be of benefit to the Pro Bono scheme and the wider OR community and third sector; and hopefully, to you and your client as well.

Resources available

We have a number of resources available to volunteers including:

- a list of free software
- links to resources on 'measuring impact'
- 'hints and tips' for a successful project
- an introduction to the charity sector (see below)

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INFORMATION ABOUT THE CHARITY SECTOR

Never worked with a charity before? Things you should know!

1. There are hundreds of thousands of voluntary organisations in the UK. Many of these, for example sports clubs, Parent-Teacher Associations, social clubs, etc, are not charities. It is estimated that there are around 350,000 charities, of which 180,000 are registered with the Charity Commission (see below).
2. There is a very wide variety of charities: those with next to no income and those with billion pound turnover; local, national or global charities; entirely professional or entirely volunteer-based.
3. It is not possible to generalise about charities just as it is not possible to generalise about public sector or private sector organisations. In many cases, there is no significant difference between sectors in the way they work, the legal framework, or the commitment to operating efficiently and effectively. However, there are some specific features of charities.

All charities

4. Charities must comply with charity law. In particular, they must be for the public benefit, must have entirely charitable aims, and must have a trustee body. The trustees are entirely accountable for the charity's proper operation, and delivery of its charitable objects. Except in exceptional circumstances, the trustee role is unremunerated. Trustee bodies vary considerably in how active they are in practice, and what role they take relative to any paid staff or operational volunteers; but they all have the same underlying legal responsibility for the running of the charity.
5. Charities with more than £5,000 income must be registered with the Charity Commission, which is the relevant regulator. The Charity Commission website publishes information about every registered charity, and also has extensive guidance about good practice, and regulatory and statutory requirements.
6. Registered charities must have a governing document, which sets out, amongst other things, the charitable objects – the purpose(s) for which the charity exists.
7. Charities may have a variety of income sources, including: receipts from sale of goods or services; income from contracts (in particular, these days, from local authorities); grants either from statutory sources, the Lottery, or from grant-making charitable trusts and foundations; donations from companies or individuals, including legacies; and income from events. Many of these represent one-off or short-term funding. As a result it is more common in the charity sector – especially amongst smaller charities - to have considerable uncertainty about future levels of funding, and erratic income flow. Fundraising has become a profession in its own right, in order to maximise income from grants, donations and events.
8. Charities are required to account separately for 'unrestricted' and 'restricted' funding. Funding is 'restricted' if the donor or grantmaker has given the money to be used for a specific purpose only; it cannot normally be used for any other purpose. (Contract funding is not usually restricted – as long as the services specified in the contract are delivered, the funding can be used as the charity sees fit.)
9. For this and other reasons, charity accounting differs in some respects from public or private sector accounting: there is a separate Charities Statement of Recommended Practice.

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Some practical pointers for success

This document has been put together in order to give you some information that might be helpful to consider before undertaking a Pro Bono OR project.

The Third Sector - including charities, social enterprises, mutual and indeed any organisations that are not part of the private or state sectors - is different. And doing OR as a volunteer rather than as a paid person or student is also different. But does that mean that you need to approach the project differently?

Table 1 below outlines success factors that you need to get right in order for a project to be successful and also key issues for Pro Bono volunteers related to those factors.

Other issues to consider:

- The project almost always takes longer than you would expect:
- Clients' time is hard to get: Board level people are generally part-time volunteers committed to only a few hours a month, and people in operational roles (including CEO) are generally overworked
- Overrun is frequently a cost-free risk to the client
- The 'and another thing' syndrome
- Clients can be relatively naïve, especially 'SME'-equivalent clients, because OR is so unusual in the sector
- There is usually something else underlying the presented problem
- The stakeholder landscape is generally complex
- Small charities are almost always very vulnerable to adverse environmental change, and the consultant needs to be sensitive to this

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Appendix

Table 1: Success factors and pro bono issues (Ruth Kaufman Sept 2014)

Success Factors	Issues for Pro Bono
Behave professionally and ethically	Only take on projects for which you are technically qualified. Ask for help from our experienced mentors if you need technical advice
Understanding and clarifying risks to successful project completion	Note client engagement issues below; also be absolutely clear about your own availability and any risks of you being unable to complete
Being able to think on your feet	Don't try to bluff where you have no knowledge; admit you will need to ask for advice from colleagues
Good listening to client (including probing for underlying issues)	
Client engagement	Some charities experience frequent personnel changes, which may affect project continuity. Try to make sure that you always have contact with someone who understands what you are doing and wants your output. Even with continuity, other demands on the client may cause them to de-prioritise the project. Be sensitive to/respect their changing priorities, but get in touch with the Pro Bono Coordinator if it is becoming problematic
Consultant has done their prior research	This should include sector understanding. Do review all the materials in 'resources for volunteers' to see what might be relevant to you
Good communication and trust	Need to use appropriate language (see 'prior research')
Not scaring client off	Bear in mind possible relative inexperience
Identifying key stakeholders	Bear in mind particular structure of sector, including respective roles of volunteers, trustees and paid staff
Suitable client expectations, well-managed	Many charities, especially small ones, have little or no experience of consultancy or analysis; bear this in mind and be willing to be flexible and adaptable
Clients (and the right people at the client) have time to give information	Understand clients' time constraints (especially an issue for trustees, or for small delivery-focused charities)
At some point before it is too late, there is an agreed product/ToR/timing/scope/report/plan	<p>a) Greater flexibility may be necessary because of clients' relative inexperience</p> <p>b) Danger of project drift as a result of client inexperience and your own emotional involvement and desire to 'do good'</p> <p>c) Commitment to timings should be as rigorous as paid external consultant; don't think, or allow client to think, that because it is unpaid, standards can be lowered mid-project</p>

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Table 1 (continued)

Success Factors	Issues for Pro Bono
Having empathy (i) with organisation's objectives, (ii) with organisation's way of working	a) Need client to believe in your empathy b) but mustn't allow it to override your professional judgement and c) must be willing to challenge
Technically competent consultant (includes ability to put self in client's shoes)	a) Emotional or social drive to do something for the charity may override professional judgement on own competence; b) Need to be willing to pull out if necessary, but also need to consider what would be most helpful for the charity, and adapt practice to meet their needs; c) Need to be willing to agree different product if necessary

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